

Internal Revenue Service

Automated Enrollment For e-File Providers The Externals Guide

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1. About This Guide

1.1. Who Should Use This Guide

The IRS developed this guide for the Modernized e-File (MeF) Application's authorized contacts who need to use Automated Enrollment (AE) to enroll A2A Client Application Systems into the IRS Application to Application (A2A) channel.

1.2. How to Use This Guide

The purpose of this document is to describe the User Interface (UI) for the AE for e-File Providers Application, hereunto, referred to as AE Application. You may or may not need to read this guide from beginning to end depending on your level of experience with Automated Enrollment. You can reference the table of contents to help locate sections of the guide pertaining to the task you need to complete. Section 3.4 "Getting around Automated Enrollment" also guides you to specific tasks and features, so when you have a question about an AE function, it is easy to locate the answer.

1.2.1. Overview of Contents

This guide provides instructions on how to enroll and maintain A2A Client Application Systems using the Integrated Enterprise Portal (IEP). Its scope is limited to the e-file functionality of the AE Application. However, this guide does not discuss any administrative aspects of the AE Application nor does it discuss how to use the IEP other than the aspects you need to know to access the AE Application.

1.2.2. Highlighting

This guide uses the following elements to emphasize key points:

• Bold

Highlight items and indicate specific items from the UI.

• "Tip, Note, and Important!" Tags

Highlight additional information related to the current task or topic.

- The "**Tip**" tag provides alternative methods of performing a task.
- The "**Note**" tag explains how the system works or provides information you may use to alter the way you perform a task.
- The "Important!" tag warns when an action could cause critical system errors.

1.3. As sumptions

You must have the following to use the AE Application:

- An IEP username and password and your account has the e-Services MeF role
- You successfully proofed your identity at the required level of assurance (LOA)
- The use of Windows 7 or higher and one of the following Web browsers:
 - Internet Explorer 8 or higher

2. Automated Enrollment Overview

The AE Application provides a user interface for enrolling and maintaining A2A Client Application Systems for the IRS A2A Channel. It assigns a unique A2A Client Application System ID (ASID) to each Application System enrolled. The IRS A2A Channel uses the ASID and the Application System's X509 certificate to authenticate and authorize access to IRS A2A services. The section below summarizes the functionality of the AE Application.

2.1. Features and Functions

Table 2-1 provides a description of the functions available in the AE Application.

Table 2-1 AE Functions

Function	Description
enrollAppSystem	AE Application allows you to enroll an A2A Client Application System into the IRS A2A Channel. Each Application System enrolled must be assigned at least one IRS A2A Service and have certificate authentication.
updateAppSystem	AE Application allows you to modify the A2A Client Application System definition. As an example, you can modify an A2A Client Application System to include additional IRS A2A Services or you can inactivate or un-enroll it.
Upload Certificate	AE Application allows you to change the certificate associated to an A2A Client Application System.

Note: Automated Enrollment no longer supports password authenticated ASIDs (See Appendix D Handling Existing Password Authenticated ASIDs).

2.2. Data Attributes

Table 2-2 describes the data elements used in the AE Application.

Table 2-2 AE Data Elements

Data Element	Description		
A2A Client System ID (ASID)	A2A Client System ID (8 characters): This is a unique field assigned to the A2A Client Application System during the enrollment process. The ASID is a combination EFIN + ASID Sequence Number.		
A2A System ID Status	The status assigned to the A2A Client Application System. Table 2-4 describes the available statuses for an Application System.		
Application System Name	The name assigned to the A2A Client Application System. It is limited to 30 alphanumeric characters.		
ASID Sequence Number	A unique 2-digit sequence number used to create the A2A Client System ID (ASID). Enter a unique value in the range of 00 to 99.		
Available ETINs	The ETINs the user wants to assign to this A2A Client Application System		
Available Services	The IRS A2A Services that are available for MeF state and third party transmitters (see Table 2-3 for a list of the available services).		
Certificate Authority	The CA is the trusted entity that issued the digital certificate.		
Certificate Expiration	The date the digital certificate is no longer valid.		
Certificate File Name	The X509 certificate used to authenticate an A2A Client Application System in the IRS A2A channel.		
Credential Type	The authentication method the A2A Client Application System uses when accessing IRS A2A Services. Default is certificate. You cannot change the authentication method.		
Customer Name	The Legal Name of the Customer's organization associated to the EFIN.		

Description	A description you want to use to identify an A2A Client Application System. It is limited to 50 alphanumeric characters.
Doing Business As	The Doing Business As name of the Customer's organization associated to the EFIN.
EFIN	Electronic Filing Identification Number is the six-digit number assigned by IRS to identify the Providers by IRS district and is used as part of the Declaration Control Number.
ETIN	Electronic Transmitter Identification Number is a five digit number assigned by IRS to each applicant who transmits returns directly to the IRS data communications subsystems or who intends to develop software for the purpose of formatting electronic returns to IRS specifications.
Location	The location of the A2A Client Application System This is usually the City and State where an A2A Client Application System resides. It is limited to 30 alphanumeric characters.
Selected ETINs	The ETINs assigned to an A2A Client Application System
Selected Services	The IRS A2A Services assigned to an A2A Client Application System (see Table 2-3 for a list of the available services).

2.3. IRS A2A Ser vices

Table 2-3 lists the IRS A2A services for State and Third Party Transmitters.

Table 2-3 Available Services

Service	State Agency	Transmitter
ETINRetrieval	Х	Х
EtinStatus	Х	Х
Get2290Schedule1		Х
Get2290Schedule1s		Х
Get2290Schedule1sByMsgID		Х
GetAck		Х

GetAckNotification	Х	
GetAckNotifications	Х	
GetAcks		X
GetAcksByMsgID		Х
GetNew2290Schedule1s		X
GetNewAckNotifications	Х	
GetNewAcks		Х
GetNewSubmissions	Х	
GetNewSubmissionsStatus		Х
GetStateParticipantsList1	Х	Х
GetSubmission	Х	
GetSubmissionReconciliationList	Х	
GetSubmissions	Х	
GetSubmissionsByMsgID	Х	
GetSubmissionsStatus	Х	Х
GetSubmissionStatus	Х	X
SendAcks	Х	
SendSubmissionReceipts	Х	
SendSubmissions		Х

2.4. Allowed Statu s Changes

Table 2-4 AE Status Matrix summarizes the A2A Client Application System status changes.

Table 2-4 AE Status Matrix

Current Status	Request Status	New Status	Action
	new	active	Allowed
active	inactivate	inactive	Allowed
active	un-enroll	deleted	Allowed
inactive	activate	active	Allowed
inactive	un-enroll	deleted	Allowed
disabled	activate	disabled	Disallowed
disabled	un-enroll	disabled	Disallowed

- "Current Status" is the Status of the Application System
- "Request Status" is the status change request
- "New Status" is the Application System status after the status change request completes
- "Action" indicates whether you can perform the change

Note: AE Application changes the status from new to active after it enrolls an Application System.

Note: Un-enrolling the Application System effectively deletes the ASID from the AE Application, and means you cannot update it again, while inactivating an Application System allows you to inactivate and activate as necessary.

Important! The IRS Help Desk initiates the disabled status when an Application System violated the policies of the IRS.

Note: Once disabled, the Application System cannot access IRS A2A Services; however, the IRS Help Desk can activate the disabled Application System (see Appendix C) for instructions on how to contact the IRS Help Desk.

3. Displa ying your ASIDs

You access the AE Application by logging into a secured environment known as the "Integrated Enterprise Portal (IEP)". This section explains how to launch the AE Application and introduces you to the user interface.

3.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

3.2. How to Do It

Type <u>http://www.irs.gov</u> into your browser. The IRS Home page opens (see Figure 3-1).

ŝ	MIRS				Search Q Help News Language ~ Charities & Nonprofits Tax Pros			
	File	Pay	Refunds	Credits & Dedu		Forms & In		
	 Pay My Tage 	ax Bill			C Filing	Information		
1	🗱 Get My Re	efund Status			Apply	For an Employe	er ID Number (EIN)	
	🖹 Get My Ta	x Record			⑦ Get An	swers to Tax Qu	estions	
	G Free File				Indivi	idual Taxpayer I	D Number (ITIN)	

Figure 3-1 IRS Home Page

• Click the "**Tax Pros**" heading at the top of the page (see Figure 3-2).

	WIRS			Help 1	Search Q Help News Language ~ Charities & Nonprofits Tax Pros			
	File Pay Refunds			Credits & Deductions Forms & Instructions				
	A A	TX						
	Pay My	Tax Bill		0,	iling Information			
1	🛱 Get My I	Refund Status			Apply For an Employ	ver ID Number (EIN)		
	🖹 Get My T	ax Record		? c	iet Answers to Tax (uestions		
	Free File				Individual Taxpayer	ID Number (ITIN)		

Figure 3-2 for Tax Pros heading

• Click the "**Tax Pros**" heading at the top of the page. The Tax Professionals page opens (see Figure 3-3).

Home > Tax Pros > Tax Professionals

Tax Professionals

Enrolled Agents	Popular	
Annual Filing Season Program Participants	Forms, Publications and Instructions EIN	Power Of Attorney (POA) Notice or Letter
Enrolled Retirement Plan Agents	• <u>ITIN</u> • <u>Refund</u>	Fraud or Scam Where to File
Certified Professional Employer Organizations (CPEO)	Pay ACA Continuing Education Resources	<u>Research Guidance</u> <u>Identity Theft</u>
Enrolled Actuaries		
E-File Providers		
Modernized e-File	e-Services Get access to Transcript Delivery System, TIN Matching, e-file and ACA Applications.	PTIN System Status: Online
	Access e-Services	Renew or Register

Figure 3-3 Tax Professionals Page

• Click the "Access e-Services" link. The e-Services – Online Tools for Tax Professionals page opens (see Figure 3-4).

AE Externals Guide

#IRS		Help News	Language ~ Ch	arities & Nonprofit	ts Tax Pros
File Pay	Refunds	Credits & Deductions	Forms & Instruc	tions	

e-Services - Online Tools for Tax Professionals

Enrolled Agents

Annual Filing Season Program Participants

Enrolled Retirement Plan Agents

Certified Professional Employer Organizations (CPEO)

Enrolled Actuaries

E-File Providers

Modernized e-File

e-Services is a suite of web-based tools that allow tax professionals, reporting agents, mortgage industry and payers to complete transactions online with the IRS. The tools include Registration Services, e-file Application, Transcript Delivery System and Taxpayer Identification Number (TIN) Matching. These services are only available to approved IRS business partners as noted below and not to the public.

English

Authorized business partners who need assistance using the online tools can contact the e-help Desk at 866-255-0654 International callers must dial 512-416-7750 and ACA 866-937-4130.

e-Services Hot Topics

Subscribe to Quick Alerts: Stay informed about issues affecting e-Services and e-file. See Subscribe to Quick Alerts.

Important information for e-Services users: The IRS is planning major improvements this summer and fall to e-Services that will affect all e-Services users. Please review Important Update about Your e-Services Account for details.

Scam Alert: There are ongoing criminal campaigns to steal tax pro account passwords and client data. See our <u>Protect Your</u> <u>Clients; Protect Yourself</u> for the latest alerts.



e-file Transmission Services

There are two data communication channels between external clients and e-file transmission.

A2A This transmission method uses Automated Enrollment (AE) to enroll and maintain the A2A Client Application Systems. You must have an e-Services Username and Password and a completed e-file Application for an EFIN to use AE. For more information see the <u>Automated Enrollment User Guide</u> and how to <u>Become an Authorized e-file Provider</u>.



Automated Enrollment (AE) Provides a user interface for enrolling and maintaining A2A Client Application Systems for the IRS



IFA This transmission method allows users to login to e-Services and upload a file for transmission. You must have an e-Services Username and Password and a completed e-file Application and an EFIN. For more information see Publication 4164

GO

int Deliver tom TPC

Figure 3-4 e-Services – Online Tools for Tax Professions Page

• Scroll down to the "*e-file Transmission Services (Automated Enrollment AE)*" section and click the "GO" link. The Login Page opens. (see Figure 3-5).

3.3. IEP Login

Tip: You can access the IEP Login Page directly by typing the URL <u>https://la.www4.irs.gov/ae_rup_svcs/</u> into the browser.

ign Up	Log In
on't have an account? Create one now.	Already have a username? Welcome back!
	Username
CREATE ACCOUNT	
	LOG IN >
	Forgot Username
	PTIN and FIRE users need a separate account in this system

Figure 3-5 IEP Login Page

• Enter your username and click the LOG IN button. The Password Page opens (see Figure 3-6).

Log In		
Verify that your Site Image and	Site Phrase below are correct. If the Site Image and Site Phrase are not correct, please do not proceed.	
Your Site Image:		
Your Site Phrase:		
watup		
Password		
Forgot Password		
- orgott doomong		
CANCEL SUBMIT		

Figure 3-6 Password Page

• Enter your password and click the **Submit** button. The Security Code page opens (see Figure 3-7)

WIRS	
	rity code text message to your phone
A 6-digit security code has 6-digit security code	Been sent to the phone number you provided (ending in 1234). Please enter your security code below.
CANCEL SUBM	No longer have access to this phone?
	IRS Privacy Policy Security Code Terms and Conditions Accessibility

Figure 3-7 IRS Security Code Page

• Enter your six-digit security code and click the **Submit** button. Your login history page opens (see Figure 3-8).

WIRS

our Login History		
Date	Time	Activity
Sep 15, 2017	09:29	Login
Sep 14, 2017	13:58	Login
Sep 14, 2017	13:55	Login
Sep 14, 2017	13:21	Login
ecurity Announcement	t	
EST MOD 5/20/2016		

Figure 3-8 Login History Page

• Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).

WIRS						
Select Organization						Signed in as: Sign Out
Select the organization you will represent	in this se	ession	:			
Each item below represents an organization fo logging in as an authorized user of that organiz						erform work. By selecting an organization, you are rm work for only that organization.
🗇 Individual						
O MANUEL CONTRACTOR OF AN ADDRESS		-		-		and a second
O BALL TRANSPORT OF AND A LOSS OF A				ц.		
C M TANK MANAGEMENT	-	-	-		6.1	and a
O DESCRIPTION OF THE OWNER					6.1	
O MARTIN MARTINE AND AND						
O (ALL COMPANY AND ALL COMPANY AND A						
		1				
IRS Privacy Police	y Secu	arity (Code	Terr	ns a	and Conditions Accessibility

Figure 3-9 IRS Select Organization Page

• Select your e-File organization and click the **Submit** button. The AE Application Search Results Page opens (see Section 3.4 Getting around Automated Enrollment)

Important! When you are finished with your AE Application session please close your browser.

3.4. Getting around Automated Enrollment

The Search Results page (see Figure 3-10) is the launch pad to all of the features and functions of the AE Application. It displays a list of A2A Client Application Systems for the selected organization. From here, you can enroll and maintain A2A Client Application Systems.

		Create New A2A Client System ID		
	0	Upload Certificate to Multiple A2A Client System ID's	G	
EFINs	540125 🗸		9	
Customer Name	VALLEY HEALTHCARE	9		
Doing Business As	MIDDLEWARE CORPAG	T01		0
ASID Name		Description	Status	Actions
54012502 Test App S	ystem	This is a test	active	Edit Replace Certificate
54012503 Test App S	ystem	This is a test	new	Edit
54012504 Test App S	ystem	This is a test	active	Edit Replace Certificate
54012505 Test App S	ystem	This is a test	new	Edit
54012506 Test App S	ystem	This is a test	active	Edit Repla Partificate
54 207 Test App S	ystem	This is a test	new	Edit
54012508 Test App S	ystem	This is a test	active	Edit Replace Certificate
54012509 Test App S	ystem	This is a test	new	Edit
54012510 Test App S	ystem	This is a test	active	Edit Replace Certificate
54012511 Test App S	ystem	This is a test	new	Edit
54012512 Test App S	ystem	This is a test	deleted	View 8
54012513 Test App S	ystem	This is a test	new	Edit
54012515 Test App S	ystem	This is a test	new	Edit
54012517 Test App S	ystem	This is a test	new	Edit
54012519 Test App S	ystem	This is a test	new	Edit
54012521 Test App S	ystem	This is a test	new	Edit
54012544 Test App S	ystem	This is a test	active	Edit Replace Certificate
54012585 Test App S	ystem	This is a test	active	Edit Replace Certificate
54013500 Test Ann 9	vetom	This is a tost	octivo	Edit I Donlaco Cortificato

Figure 3-10 AE Application Search Results Page

1	Scroll through the list of Application Systems. The maximum number of records is set to 200.
0	By default, the AE Application sorts the list by EFIN.
3	Click the arrow to the right of the EFINs field and select an EFIN to filter the list.
4	Click the Create New A2A Client System ID button to enroll a new A2A Client Application System (see Section 4 Enrolling an Application System).
6	Click the Upload Certificate to Multiple A2A Client System ID's button to upload a certificate to many Application Systems in one transaction (see Section 10 Bulk Certificate Upload).

6	 Click the <i>Edit</i> link to change an A2A Client Application System definition (see Section 5 Updating an Application System). Here you can change the status of the Application System or you can change any of the following Application System attributes: Application System name Description Location Upload a new Certificate Services ETINs Note: The "<i>Reset Password</i>" link has been removed from the list of displayed ASIDs. For any existing password authenticated ASIDs click the '<i>Edit</i>' link to change the credential type to '<i>Certificate</i>' (See Appendix D Handling Existing Password Authenticated ASIDs).
7	Click the <i>Replace Certificate</i> link to upload a new certificate for an Application System (see Section 9 Replacing a Certificate).
8	Click the <i>View</i> link to display an un-enrolled Application System (see Section 11 Viewing an Un-Enrolled Application System).
9	The AE Application displays your organizations legal name and doing business as (DBA) name provided during the e-File application process

Note: In the event of an error displaying your Application Systems, an error page opens (see Figure 3-11). Contact the IRS Help Desk to report the error condition. Refer to Appendix C for additional information.

Note: You can fix display issues by turning on Internet Explorer Compatibility View.

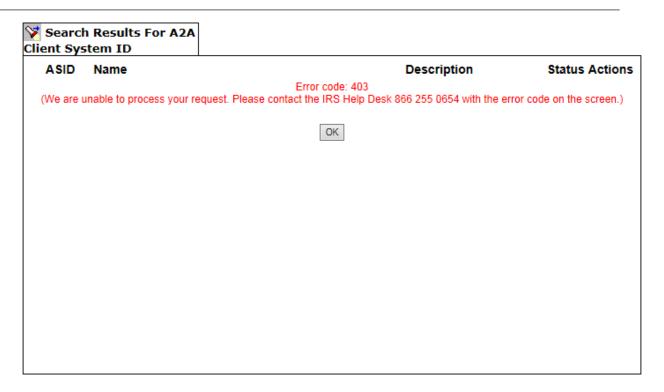


Figure 3-11 Error occurred displaying the search results page

4. Enrollin g an Applicati on System

This section describes the actions required to enroll an e-File Client Application System into the IRS A2A Channel.

4.1. Prerequisites

- You have the e-Services MeF role assigned to your IEP user account.
- You have a valid X509 certificate accessible from the local system.

4.2. How to Do It

Figure 4-1 depicts the navigation steps to enroll an Application System.

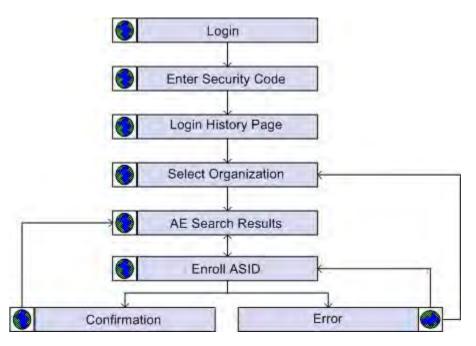


Figure 4-1 How to Enroll an Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 4-2).

🎖 Search Results	5 For A2A	0		
		Create New A2A Client System ID		
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸			
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQT01	I		
ASID Name		Description	Status	Actions
54012502 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012504 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012506 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012508 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012510 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012512 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012544 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012585 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012599 Test App Sy	/stem	This is a test	active	Edit Replace Certificate

Figure 4-2 Create New A2A Client System ID Button

Click the **Create New A2A Client System ID** button. The Create New A2A Client System ID page opens (see Figure 4-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

0

ber 3 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 5 4 5 5 5 5 5 5 5 5 5 5 5 5 5
3 3 5 3 ame of the certificate to
3 3 4 5 6 ame of the certificate to
3 3 4 5 6 ame of the certificate to
stems: Initial Login, Login,
e Services list above by ected Services list above by
Selected ETINS
l NS list above by highlighting
no nor obove by ingringriding

Figure 4-3 Create New A2A Client System ID Page

Fill in the form and click **Save** to enroll the Application System, refer to section 2.2 Data Attributes for a description of each field.

1	EFIN: Click the arrow to the right of the EFIN field and select an EFIN from the list.			
0	ASID Sequence Number : Enter a unique 2-digit sequence number. Enter a unique value in the range of 00 to 99			
3	Application System Name: Enter the name for the Application System.			
4	Description: Enter the Description for the Application System.			
6	Location: Enter the Location for the Application System.			
6	Click the Browse button to select the certificate to assign to this Application System. The certificate must be accessible from the local system.			
7	Select at least one IRS A2A Service from the Available Services list and click the Add button. Table 2-3 lists the available services for state and third party transmitters.			
8	Select at least one ETIN from the Available ETINS list and click the Add button.			
9	Click Save , if the request is successful the Confirmation for A2A Client System ID page opens (see Figure 4-5).			
0	Click Cancel to return to the AE Application Search Results page.			

Note: In the event of a data entry error, an error dialog opens (see Figure 4-4). Follow the instructions in the dialog and click **OK** to return to the Create New A2A Client System ID page to correct the error.

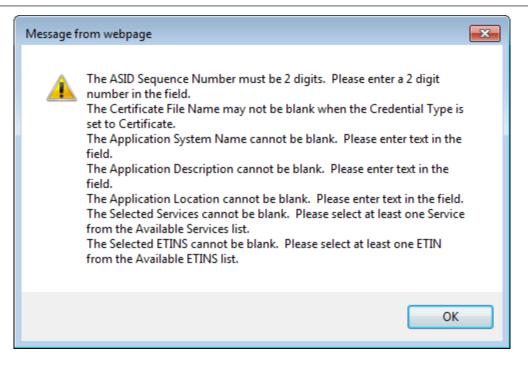


Figure 4-4 A data entry error occurred enrolling an Application System

4.3. Confirmat ion Pag e

Figure 4-5 depicts the Application System confirmation page.



Figure 4-5 Confirmation for enrolling an Application System

1	The ASID assigned to the enrolled Application System
2	The Confirmation Message
3	Click OK to return to the AE Application Search Results page

5. Upd ating an Applicati on System

This section describes the actions required to change an e-File A2A Client Application System definition.

5.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

5.2. How to Do It

Figure 5-1 depicts the navigation steps to change an Application System.

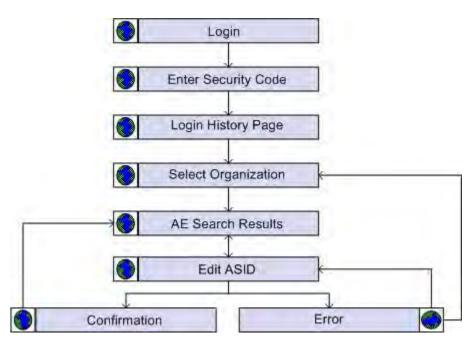


Figure 5-1 How to Edit an Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 5-2).

Search Results For A2A Client System ID					
		Create New A2A Client System ID	1		
		Upload Certificate to Multiple A2A Client System ID's			
EFINs	540125 🗸				
Customer Name	VALLEY HEALTHCARE				
Doing Business As	MIDDLEWARE CORPAQTO	11			
ASID Name		Description	Status	Actions	
54012502 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012504 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012506 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012508 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012510 Test App System		This is a test	active	Edit Replace Certificate	
54012512 Test App System		This is a test	active	Edit Replace Certificate	
54012544 Test App System		This is a test	active	Edit Replace Certificate	
54012585 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012599 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	

Figure 5-2 Selecting the Application System to update

Locate the *ASID* and click the *Edit* link under the *Actions* column. The Edit A2A Client System ID page opens (see Figure 5-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

1

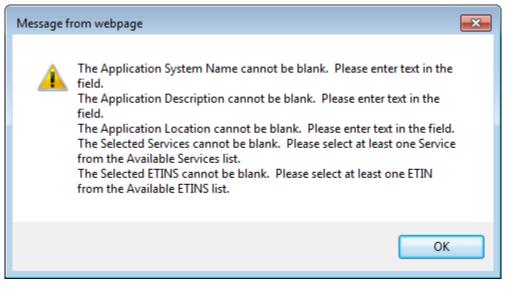
Customer Name VALLE			
Doing Business As MIDDL			
Doing Business As MiDDL	EWARE CORFACTOR		
A2A Client System ID 540	12599		
Application System Name	Test App System	O	
Description	This is a test		
Location	Some City, ST		
A2A Client System ID Status	active	4	
Credential Type	Certificate 🗸		
Certificate File Name		Browse	
Current Certificate File Name	Eypur_metion	0	
Current Certificate File Expiration	Sat Feb 23 09:55:07 CST	2019	
Current Certificate File Authority	OU=OCIO CA,OU=Centific	auon Authonides, OU=Depa	
Available Services		Selected Services	
Available Services ETINStatus GetStatus SendSubmissions	Add>>		
ETINStatus GetStatus SendSubmissions	e to all authorized A2A	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout.	
ETINStatus GetStatus SendSubmissions Common Services are availabl To add Services, select your S lighlighting them and clicking of To remove Services, select you	e to all authorized A2A ervices choices from the on the Add button. ur Services choices from	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval	
ETINStatus GetStatus SendSubmissions Common Services are available to add Services, select your S ighlighting them and clicking of to remove Services, select you	e to all authorized A2A ervices choices from the on the Add button. ur Services choices from	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout.	
ETINStatus GetStatus SendSubmissions Common Services are availabl to add Services, select your S highlighting them and clicking of the oremove Services, select you ighlighting them and clicking of	e to all authorized A2A ervices choices from the on the Add button. ur Services choices from	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. e Available Services list above by n the Selected Services list above by	
ETINStatus GetStatus SendSubmissions Common Services are available to add Services, select your S highlighting them and clicking of the and clicking of Available ETINS 10688 10689	e to all authorized A2A a ervices choices from the on the Add button.	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. Available Services list above by In the Selected Services list above by Selected ETINS	
ETINStatus GetStatus SendSubmissions Common Services are available To add Services, select your S highlighting them and clicking of Co remove Services, select your highlighting them and clicking of Available ETINS 10688 10689	e to all authorized A2A ervices choices from the on the Add button. ur Services choices from on the Remove button. Add >> < Remove N choices from the Avai putton. ETIN choices from the services	Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. e Available Services list above by In the Selected Services list above by Selected ETINS 10687	



Update the form and click **Save** to change the Application System definition, refer to section 2.2 Data Attributes for a description of each field.

1	Application System Name: If you wish, change the name of the Application System.			
2	Description: If you wish, change the description of the Application System.			
3	Location: If you wish, change the location of the Application System.			
4	If you wish, click the arrow to the right of the A2A Client System ID Status field and select another value from the list. Refer to Table 2-4 AE Status Matrix for a list of allowed status changes for an A2A Client Application System.			
6	If you wish, click the Browse button to select a new certificate to assign to this Application System. The certificate must be accessible from the local system.			
6	If you wish, change the Selected Services list. To add an IRS A2A Service, select the service from the Available Services list and click the Add button. To remove an IRS A2A Service, select the service from the Selected Service list and click the Remove button.			
0	If you wish, change the Selected ETINS list. To add an ETIN, select the ETIN from the Available ETINS list and click the Add button. To remove an ETIN, select the ETIN from the Selected ETINS list and click the Remove button.			
8	Click Save , if the request is successful the Confirmation for A2A Client System ID page opens (see Figure 5-5).			
9	Click Cancel to return to the AE Application Search Results page.			

Note: In the event of a data entry error, an error dialog opens (see Figure 5-4). Follow the instructions in the dialog and click **OK** to return to the Edit A2A Client System ID page to correct the error.





5.3. Confirmat ion Pag e

Figure 5-5 depicts the Application System confirmation page.



Figure 5-5 Confirmation Page for updating an Application System

0	The Application System has been updated
0	The Confirmation Message
3	Click OK to return to the AE Application Search Results page

Important! If you replaced the certificate, the Application System must use the new certificate to access IRS A2A Services.

6. Un-Enrolling an Application System

This section describes the actions required to un-enroll an e-File A2A Client Application System from the IRS A2A Channel.

6.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

6.2. How to Do It

Figure 6-1 depicts the navigation steps to un-enroll an Application System.

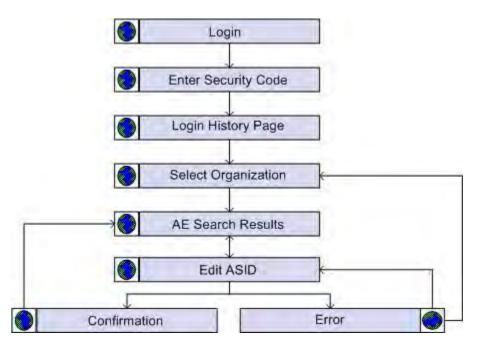


Figure 6-1 How to un-enroll an Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 6-2).

⅋ Search Result Client System ID	s For A2A		
		Create New A2A Client System ID	
		Upload Certificate to Multiple A2A Client System ID's	
EFINs	540125 🗸		
Customer Name	VALLEY HEALTHCARE		
Doing Business As	MIDDLEWARE CORPAQTO	1	
ASID Name		Description	Status Actions
54012502 Test App Sy	/stem	This is a test	active Edit Replace Certificat
54012504 Test App Sy	/stem	This is a test	active Edit Replace Certification
54012506 Test App Sy	/stem	This is a test	active Edit Replace Certification
54012508 Test App Sy	/stem	This is a test	active Edit Replace Certificat
54012510 Test App Sy	/stem	This is a test	active Edit Replace Certification
54012512 Test App Sy	/stem	This is a test	active Edit Replace Certification
54012544 Test App Sy	/stem	This is a test	active Edit Replace Certificat
54012585 Test App Sy	/stem	This is a test	active Edit Replace Certificat
54012599 Test App Sy	/stem	This is a test	inactive Edit Replace Certificat

Figure 6-2 Selecting the Application System to un-enroll

Locate an active or inactive *ASID* and click the *Edit* link under the *Actions* column. The Edit A2A Client System ID page opens (see Figure 6-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

🧭 Edit A2A Client Syst ID	em			
Customer Name VALLE	Y HEALTHCARE			
Doing Business As MIDDLEWARE CORPAQT01				
A2A Client System ID 5401	12544			
Application System Name	Test App System			
Description	This is a test			
Location	Some City, ST			
A2A Client System ID Status	active un-enroll V			
Credential Type	Certificate 🗸			
Certificate File Name	Browse			
Current Certificate File Name	Elypour_mef.ort			
Current Certificate File Expiration	Sat Feb 23 09:55:07 CST 2019			
Current Certificate File Authority	OU=OCIO CA,OU=Certification Authorities,OU=Depa			
	icate - Browse or enter the file name of the certificate to on below will upload the certificate and save the data.			
Available Services	Selected Services			
ETINStatus GetAcknowledgements GetStateParticipants GetStatus SendSubmissions	Add >> 			
Common Services are available	e to all authorized A2A Client Systems: Login and Logout.			
To add Services, select your Se highlighting them and clicking o	ervices choices from the Available Services list above by on the Add button.			
To remove Services, select you highlighting them and clicking of	ar Services choices from the Selected Services list above by on the Remove button.			
Available ETINS	Selected ETINS			
10688 10689	Add >> 10687			
them and clicking on the Add b				
To remove ETINS, select your highlighting them and clicking of	ETIN choices from the Selected ETINS list above by on the Remove button.			
	2 Save Cancel 3			

Figure 6-3 Un-enrolling an Application System

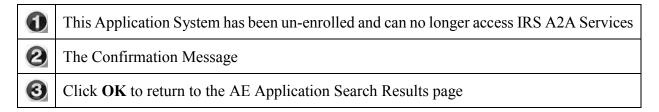
1	Click the arrow to the right of the A2A Client System ID Status field and select "un- enroll".
2	Click Save , if the request is successful the Confirmation for A2A Client System ID page opens (see Figure 6-4).
3	Click Cancel to return to the AE Application Search Results page.

6.3. Confirmat ion Pag e

Figure 6-4 depicts the Application System confirmation page.



Figure 6-4 Confirmation for un-enrolling an Application System



7. Inact ivating an Application System

This section describes the actions required to inactivate an e-File A2A Client Application System.

7.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

7.2. How to Do It

Figure 7-1 depicts the navigation steps to inactivate an Application System.

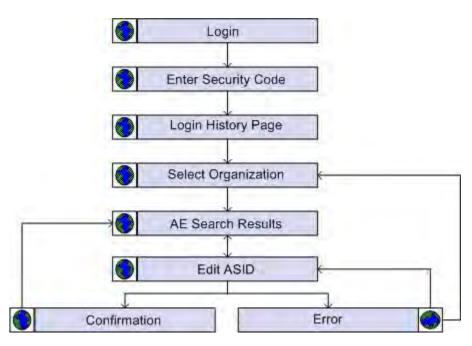


Figure 7-1 How to Inactivate an Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 7-2).

☞ Search Results Client System ID	For A2A			
	[Create New A2A Client System ID		
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸			
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQTO	11		
ASID Name		Description	Status	Actions
54012502 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012504 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012506 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012508 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012510 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012512 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012544 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012585 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012599 Test App Sy	stem	This is a test	O active	Edit Replace Certificate

Figure 7-2 Selecting the Application System to inactivate

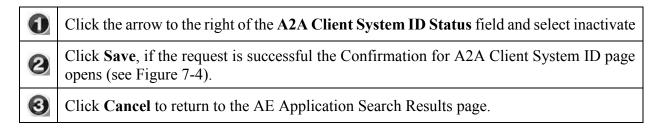
Locate an active *ASID* and click the *Edit* link under the *Actions* column. The Edit A2A Client System ID page opens (see Figure 7-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

1

Customer Name VALL	EY HEALTHCARE		
Doing Business As MIDDLEWARE CORPACITO			
0			
2A Client System ID 540)12599		
Application System Name	Test App System		
Description	This is a test		
Location	Some City, ST		
A2A Client System ID Status			
Credential Type	Certificate 🗸		
Certificate File Name		Browse	
Current Certificate File Name			
Current Certificate File Expiration		2019	
Current Certificate File Authority	OU=OCIO CA,OU=Certification Authorities,OU=Depa		
		the file name of the certificate to e certificate and save the data.	
bload. Clicking the Save but		e certificate and save the data.	
Available Services ETINStatus GetStatus SendSubmissions	Add >>	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements	
Available Services ETINStatus GetStatus SendSubmissions	Add >> Add >> Services choices from the	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval	
Available Services ETINStatus GetStatus SendSubmissions mmon Services are available add Services, select your s hilighting them and clicking remove Services, select your s	Add >> Add >> Add >> Image: Add >	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. the Available Services list above by the Selected Services list above by	
Available Services ETINStatus GetStatus SendSubmissions ommon Services are available add Services, select your so phlighting them and clicking or remove Services, select your	Add >> Add >> Add >> Image: Add >	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. the Available Services list above by the Selected Services list above by	
Available Services ETINStatus GetStatus SendSubmissions ommon Services are available add Services, select your solution phlighting them and clicking remove Services, select your phlighting them and clicking	Add >> Add >> Add >> Image: Add >	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. the Available Services list above by the Selected Services list above by	
Available Services ETINStatus GetStatus SendSubmissions ommon Services are available add Services, select your 5 ophlighting them and clicking remove Services, select your 5 ophlighting them and clicking Premove Services, select your 5 ophlighting them and clicking Description Description Description Description Description Description	Add >> Ad	e certificate and save the data. Selected Services GetStateParticipants GetAcknowledgements ETINRetrieval Client Systems: Login and Logout. e Available Services list above by m the Selected Services list above by Selected ETINS	

Figure 7-3 Inactivating an Application System

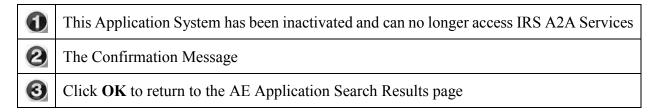


7.3. Confirmat ion Pag e

Figure 7-4 depicts the Application System confirmation page.



Figure 7-4 Confirmation for inactivating an Application System



8. Activating an Application System

This section describes the actions required to activate an e-File A2A Client Application System.

8.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

8.2. How to Do It

Figure 8-1 depicts the navigation steps to activate an Application System.

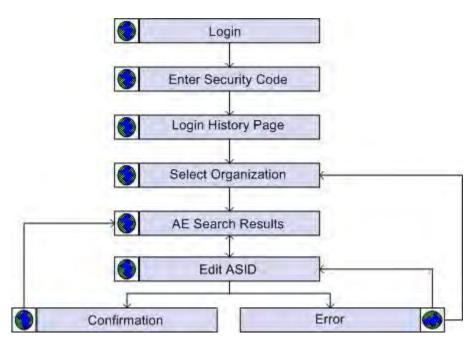


Figure 8-1 How to activate an Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 8-2).

Search Results For A2A Client System ID				
		Create New A2A Client System ID		
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸			
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQTO)1		
ASID Name		Description	Status	Actions
54012502 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012504 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012506 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012508 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012510 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012512 Test App Sy	/stem	This is a test	deleted	View
54012544 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012585 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012599 Test App Sy	rstem	This is a test	1 inactive	Edit Replace Certificate

Figure 8-2 Selecting the Application System to activate

Locate an inactive **ASID** and click the *Edit* link under the *Actions* column. The Edit A2A Client System ID page opens (see Figure 8-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

🧭 Edit A2A Client Syst ID	tem		
Customer Name VALLE	EY HEALTHCARE		
Doing Business As MIDDL	LEWARE CORPAQT01		
A2A Client System ID 5401	12599		
Application System Name	Test App System		
Description	This is a test		
Location	Some City, ST		
A2A Client System ID Status	inactive activate		
Credential Type	Certificate 🗸		
Certificate File Name	Browse		
Current Certificate File Name	Elyour_mef.ort		
Current Certificate File Expiration	Sat Feb 23 09:55:07 CST 2019		
Current Certificate File Authority	OU=OCIO CA,OU=Certification Authorities,OU=Depa		
	ficate - Browse or enter the file name of the certificate to on below will upload the certificate and save the data.		
Available Services	Selected Services		
ETINStatus GetStatus SendSubmissions	Add >> GetStateParticipants GetAcknowledgements ETINRetrieval		
Common Services are availabl	le to all authorized A2A Client Systems: Login and Logout.		
To add Services, select your Services choices from the Available Services list above by highlighting them and clicking on the Add button.			
To remove Services, select you highlighting them and clicking o	ur Services choices from the Selected Services list above by on the Remove button.		
Available ETINS	Selected ETINS		
10688	10687		
10689	Add >> << Remove		
	Remove IN choices from the Available ETINS list above by highlighting		
To add ETINS, select your ETI them and clicking on the Add b	IN choices from the Available ETINS list above by highlighting button.		

Figure 8-3 Activating an Application System

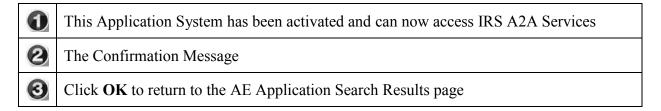
0	Click the arrow to the right of the A2A Client System ID Status field and select activate.
2	If you wish, click the Browse button to select a new certificate to assign to this Application System. The certificate must be accessible from the local system.
3	Click Save , if the request is successful the Confirmation for A2A Client System ID page opens (see Figure 8-4).
4	Click Cancel to return to the AE Application Search Results page.

8.3. Confirmat ion Pag e

Figure 8-4 depicts the Application System confirmation page.



Figure 8-4 Confirmation for activating an Application System



Important! If you replaced the certificate, the Application System must use the new certificate to access IRS A2A services.

9. Replac ing a Certificate

This section describes the actions required to replace the certificate for an e-File A2A Client Application System.

9.1. Prerequisites

- You have the e-Services MeF role assigned to your IEP user account.
- You have a valid X509 certificate accessible from the local system.

9.2. How to Do It

Figure 9-1 depicts the navigation steps to replace the certificate.

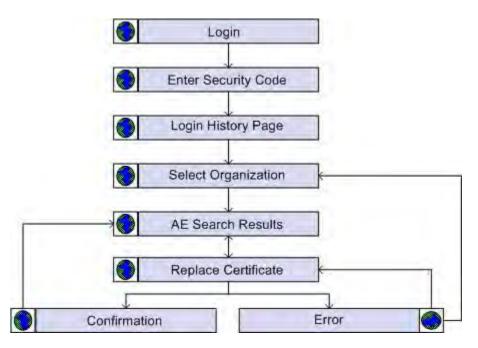


Figure 9-1 How to Replace a Certificate

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 9-2).

Search Results For A2A Client System ID				
		Create New A2A Client System ID		
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸			
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQTO	11		
ASID Name		Description	Status Actions	
54012502 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012504 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012506 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012508 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012510 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012512 Test App Sy	/stem	This is a test	deleted View	
54012544 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012585 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
54012599 Test App Sy	/stem	This is a test	active Edit Replace Certificate	
			0	

Figure 9-2 Replace Certificate Link

Locate the **ASID** and click the **Replace Certificate** link under the *Actions* column. The Replace Certificate page opens (see Figure 9-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

0

Application System ID	54012599		
Application System Name	Test App System		
Description	This is a test		
Location	Some City, ST		
A2A Client System ID Status	active		
Certificate File Name		Browse	0
Current Certificate File Name	l:wour_meficit		~
Current Certificate File Expiration	Sat Feb 23 09 55,07	CST 2019	1
Current Certificate File Authority	DU-DDID CA.OU+C	entification Autho	14
or a Credential Type of Certificate - Bro pload. Clicking the Save button below v			

Figure 9-3 Replace Certificate Page

1	Click the Browse button to select the new certificate. The certificate must be accessible from the local system
2	Click Save , if the request is successful the Confirmation for Replace Certificate page opens (see Figure 9-5).
3	Click Cancel to return to the AE Application Search Results page

Note: In the event of a data entry error, an error dialog opens (see Figure 9-4). Follow the instructions in the dialog and click **OK** to return to the Replace Certificate page to correct the error.

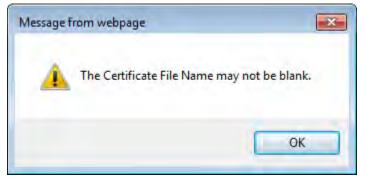


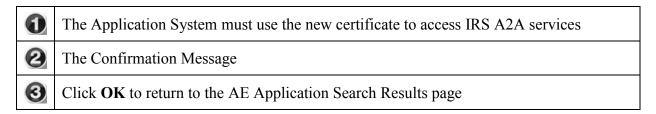
Figure 9-4 A data entry error occurred replacing a certificate

9.3. Confirmat ion Pag e

Figure 9-5 depicts the Replace Certificate confirmation page



Figure 9-5 Replace Certificate Confirmation



Tip: You can also replace the certificate when you change an Application System.

10. Bulk Certificate Upload

This section describes the actions required to replace the certificate for many e-File A2A Client Application Systems in one transaction.

10.1. Prerequisites

- You have the e-Services MeF role assigned to your IEP user account.
- You have a valid X509 certificate accessible from the local system.

10.2. How to Do It

Figure 10-1 depicts the navigation steps to do a bulk certificate upload

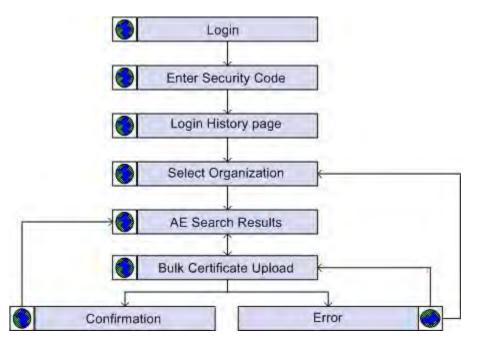


Figure 10-1 How to upload a certificate to many Application Systems

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 10-2).

Search Results Client System ID	5 For A2A		
		Create New A2A Client System ID	
		Upload Certificate to Multiple A2A Client System ID's	
EFINs	540125 🗸		
Customer Name	VALLEY HEALTHCARE		
Doing Business As	MIDDLEWARE CORPAQTO	1	
ASID Name		Description	Status Actions
54012502 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012504 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012506 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012508 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012510 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012512 Test App Sy	/stem	This is a test	deleted View
54012544 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012585 Test App Sy	/stem	This is a test	active Edit Replace Certificate
54012599 Test App Sy	/stem	This is a test	active Edit Replace Certificate

Figure 10-2 Upload Certificate to Multiple A2A Client System ID's Button

Click the *Upload Certificate to Multiple A2A Client ID's* button. The Upload Certificate to Multiple A2A Client System ID's page opens (see Figure 10-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

Available ASIDs	Selected A	SIDs
54012506 54012508 54012510 54012544 54012585 54012585 54012599	Add >> 54012502 Add >> 54012502 << Remove	
To add ASIDs, select your ASID highlighting them and clicking of	D choices from the Available ASIDs list above on the Add button.	e by
	ASID choices from the Selected ASIDs list at	ove by
highlighting them and clicking of		

Figure 10-3 Bulk Upload Page

1	Select one or more ASIDs from the Available ASIDs list and click the Add button.
2	Click Browse to select the new certificate. The certificate must be accessible from the local system.
3	Click Save , if the request is successful the Confirmation for Replace Certificate page opens (see Figure 10-5).
4	Click Cancel to return to the AE Application Search Results page.

Note: In the event of a data entry error, an error dialog opens (see Figure 10-4). Follow the instructions in the dialog and click **OK** to return to the Upload Certificate to Multiple A2A Client ID's page to correct the error.

Message f	rom webpage	×
4	The Certificate File Name may not be blank when the Credential Type is set to Certificate. The Selected ASIDs cannot be blank. Please select at least one ASID from the Available ASIDs list.	
	ОК	

Figure 10-4 A data entry error occurred during a bulk upload

10.3. Confirmat ion Pag e

Figure 10-5 depicts the Bulk Certificate Upload confirmation page.



Figure 10-5 Bulk Upload Confirmation

1	The Application Systems must use the new certificate to access IRS A2A services
2	The Confirmation Message
0	Click OK to return to the AE Application Search Results page

11. Viewing an Un -Enrolle d Application S ystem

This section describes the actions required to view un-enrolled e-File A2A Client Applications Systems.

11.1. Prerequisites

• You have the e-Services MeF role assigned to your IEP user account.

11.2. How to Do It

Figure 11-1 depicts the navigation steps to view an un-enrolled Application System.

Login	
Enter Security Code	
Login History Page	
Select Organization]
AE Search Results	
View ASID	

Figure 11-1 How to View an un-enrolled Application System

- Login to the IEP. (Section 3.3 IEP Login).
- After entering your username, password and security code. Your login history page opens (see Figure 3-8).
- Click the **Continue** button. The IRS Select Organization page opens (see Figure 3-9).
- Select your e-File organization and click the **Submit** button. The AE Application Search Results page opens (see Figure 11-2).

♀ Search Result Client System ID	5 For A2A			
		Create New A2A Client System ID		
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸			
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQTO	11		
ASID Name		Description	Status	Actions
54012502 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012504 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012506 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012508 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012510 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012512 Test App Sy	/stem	This is a test	deleted	View
54012544 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012585 Test App Sy	/stem	This is a test	active	Edit Replace Certificate
54012599 Test App Sy	/stem	This is a test	active	Edit Replace Certificate

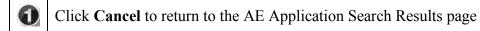
Figure 11-2 Locating an un-enrolled Application System

Locate an un-enrolled Application System (an ASID with a **deleted** status), and click the **View** link under the *Actions* column. The View A2A Client System Id page opens (see Figure 11-3).

Note: The AE Application displays an '**Error Messages**' page in the event of any error. Refer to Appendix B to obtain information on how to handle AE Application errors.

🗭 View A2A Clien System Id	it]		
Customer Name	VALLE	Y HE	EALTHCARE		
Doing Business As MIDDLEWARE CORPAQT01					
	_				
A2A Client System ID	54012	2512	2		
Application System	Name	Test	t App System		
Descri			s is a test		
		Some	ne City, ST		
A2A Client Syste S	em ID status	delet	ated		
Credential	Туре	Cer	ertificate 🗸		
Certificate File	Name		Browse		
Current Certificat	e File Name	l:\you	pur_mef.ort		
Current Certificat Expir	e File ration	Sat F	Feb 23 09:55:07 CST 2019		
Current Certificat Auth	e File hority	OU=0	=OCIO CA,OU=Certification Authorities,OU=Depa		
			 Browse or enter the file name of the certificate to elow will upload the certificate and save the data. 		
aproad. Onloang the out	re ballo				
Available Serv	ices		Selected Services		
ETINStatus GetAcknowledgen GetStateParticipar GetStatus SendSubmissions	nts		Add >>		
Common Services are a	vailable	to al	all authorized A2A Client Systems: Login and Logout.		
To add Services, select highlighting them and cli			es choices from the Available Services list above by e Add button.		
To remove Services, sel highlighting them and cli			rvices choices from the Selected Services list above by e Remove button.		
Available ETI	NS		Selected ETINS		
10688 10689			Add >> << Remove		
To add ETINS, select your ETIN choices from the Available ETINS list above by highlighting them and clicking on the Add button.					
highlighting them and cli					
			Cancel		

Figure 11-3 View A2A Client System Id Page



Appen dix A	List of Abbreviations
A2A	Application to Application
AC	Access Control
AE	Automated Enrollment
AI	Application Integration
ASID	A2A Client System ID
Authorized Contact	Registered State or other Third Party Transmitter user
CA	Certificate Authority
DBA	Doing Business As
EFIN	Electronic Filer's Identification Number
ETIN	Electronic Transmitter Identification Number
IE	Internet Explorer
IEP	Integrated Enterprise Portal
IRS	Internal Revenue Service
LOA	Level of Assurance
MeF	Modernized e-File
SA	Strong Authentication
UI	User Interface

Appendix B Handling Errors

The AE Application displays an error page when an unexpected condition occurs processing your request. If the error is recoverable, the AE Application returns to the previous page where you can provide additional information and retry the request. However, for severe errors, the AE Application aborts your request and returns to the search results page. Follow the instructions on the screen, contact the IRS Help Desk and provide them with the error code and error message. Appendix C provides you information on how to contact the IRS Help Desk.

Figure B-1 shows the format of the AE Error page.



Figure B-1 AE Error Page Format

1	The error code, ### represents the numeric error code
2	The error message text describing the error
	Click OK to close the error page and return to the previous page or the search results page. If the error persists, contact the IRS Help Desk.

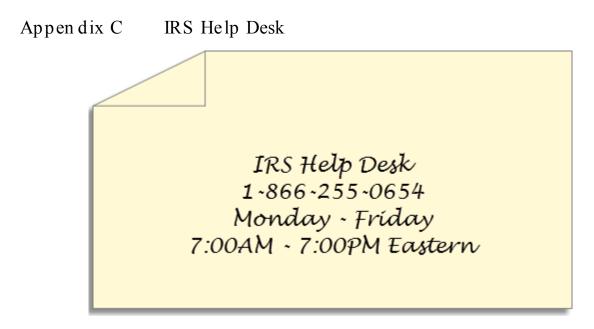


Figure C-1 Contacting the IRS-Help Desk

- Provide the error code and describe the action you were performing when the error occurred.
- For example, "I received error code 401 when I attempted to enroll an Application System."

Appendix D Handling Existing Pass word Authenticated ASIDs

Automated Enrollment no longer supports password authenticated ASIDs and as such, the "*Reset Password*" link has been removed from the Search Results page. In addition, password is no longer a valid credential type on the Create New A2A Client System ID and Edit A2A Client System ID pages. Therefore, for any existing password ASIDs you must change the credential type to certificate in order to continue transmitting returns using these ASIDs.

😵 Search Results	5 For A2A				
Client System ID					
			Create New A2A Client Syste	em ID	
			Upload Certificate to Multip A2A Client System ID's		
EFINs	540125 🗸				
Customer Name	VALLEY HE	ALTHCARE			
Doing Business As	MIDDLEWA	RE CORPAQTO	и		
ASID Name			Description	Status	Actions
54012502 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012503 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012504 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012505 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012506 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012507 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012508 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012509 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012510 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012511 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012512 Test App Sy	/stem		This is a test	deleted	View
54012513 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012515 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012517 Test App Sy	/stem		This is a test	active	Edit Res ssword
54012519 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012521 Test App Sy	/stem		This is a test	new	Edit Reset Password
54012544 Test App Sy			This is a test	deleted	
54012585 Test App Sy	/stem		This is a test	active	Edit Replace Certificate
54012500 Toot App 9	retorm		This is a tost	activo	Edit I Doplaco Cortificato

Figure D-1 Search Results (with Reset Password Link)

The "*Reset Password*" link has been removed (see Figure D-2).

0

😵 Search Results Client System ID	For A2A			
cheft bystem 15	I	Create New A2A Client System ID]	
		Upload Certificate to Multiple A2A Client System ID's		
EFINs	540125 🗸		-	
Customer Name	VALLEY HEALTHCARE			
Doing Business As	MIDDLEWARE CORPAQT	01		
ASID Name		Description	Status	Actions
54012502 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012503 Test App Sy	stem	This is a test	new	Edit
54012504 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012505 Test App Sy	stem	This is a test	new	Edit
54012506 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012507 Test App Sy	stem	This is a test	new	Edit
54012508 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012509 Test App Sy	stem	This is a test	new	Edit
54012510 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012511 Test App Sy	stem	This is a test	new	Edit
54012512 Test App Sy	stem	This is a test	deleted	View
54012513 Test App Sy	stem	This is a test	new	Edit
54012515 Test App Sy	stem	This is a test	new	Edit
54012517 Test App Sy	stem	This is a test	active	Edit
54012519 Test App Sy	stem	This is a test	new	Edit
54012521 Test App Sy	stem	This is a test	new	Edit
54012544 Test App Sy	stem	This is a test	deleted	View
54012585 Test App Sy	stem	This is a test	active	Edit Replace Certificate
54012500 Tect App Sv		This is a tost	activo	Edit I Doplaco Cortificato

Figure D-2 Search Results (no Reset Password Link)

Click the *Edit* link to change the credential type to Certificate. The Edit A2A Client System ID page opens (see Figure D-3).

0

Bedit A2A Client System ID	tem				
Customer Name VALLE	EY HEALTHCARE				
Doing Business As MIDD	LEWARE CORPAQT01				
A2A Client System ID 540	12517				
Application System Name	Test App System				
Description	This is a test				
Location	Some City, ST				
A2A Client System ID Status	active				
Credential Type	Certificate 🗸 🚺	-			
Certificate File Name	l:\your_mef.crt B	rowse			
For a Credential Type of Certi upload. Clicking the Save but		e file name of the certificate to certificate and save the data.			
Available Services		Selected Services			
ETINStatus GetAcknowledgements GetStateParticipants GetStatus SendSubmissions	Add >> << Remove	ETINRetrieval			
, Common Services are availab	le to all authorized A2A C	lient Systems: Login and Logout.			
highlighting them and clicking	on the Add button. ur Services choices from	Available Services list above by the Selected Services list above by			
Available ETINS		Selected ETINS			
10688 10689	Add >> <	10687			
To add ETINS, select your ET them and clicking on the Add		able ETINS list above by highlighting			
To remove ETINS, select your highlighting them and clicking		elected ETINS list above by			
	3 Save Cancel				

Figure D-3 Changing a Password ASID to Certificate

0	The Credential Type has been pre-selected to Certificate. You cannot change this field.
2	Click the Browse button to select the certificate to assign to this Application System. The certificate must be accessible from the local system.
3	Click Save , if the request is successful the Confirmation for A2A Client System ID page opens (see Figure D-5).

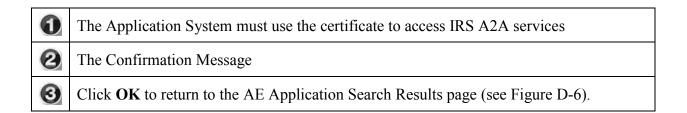
Note: In the event of a data entry error, an error dialog opens (see Figure D-4). Follow the instructions in the dialog and click OK to return to the Edit A2A Client System ID page to correct the error.

Message from webpage	
The Certificate File Name may not be blank when the Credential Type is set to Certificate.	
ОК)

Figure D-4 A data entry error occurred updating a password ASID



Figure D-5 Change Credential Type Confirmation



😵 Search Results	s For A2A				
Client System ID					
		Create New A2A Client System ID			
		Upload Certificate to Multiple A2A Client System ID's			
EFINs	540125 🗸				
Customer Name	VALLEY HEALTHCARE				
Doing Business As	MIDDLEWARE CORPAQT	01			
ASID Name		Description	Status	Actions	
54012502 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012503 Test App Sy	/stem	This is a test	new	<u>Edit</u>	
54012504 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012505 Test App Sy	/stem	This is a test	new	Edit	
54012506 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012507 Test App Sy	/stem	This is a test	new	Edit	
54012508 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012509 Test App Sy	/stem	This is a test	new	Edit	
54012510 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012511 Test App Sy	/stem	This is a test	new	Edit	
54012512 Test App Sy	/stem	This is a test	deleted	View	
54012513 Test App Sy	/stem	This is a test	new	Edit	
54012515 Test App Sy	/stem	This is a test	new	Edit	
54012517 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	
54012519 Test App Sy	/stem	This is a test	new	Edit	
54012521 Test App Sy	/stem	This is a test	new	Edit	
54012544 Test App Sy	/stem	This is a test	deleted	View	
54012585 Test App Sy	/stem	This is a test	active	Edit Replace Certificate	V
54012500 Tect App St	/ctom	This is a tost	activo	Edit I Donlaco Cortificato	

Figure D-6 Search Results (ASID changed to Certificate)

The ASID credential type has been changed to certificate.

1